

# LEARNING IN ACTION

## How to Conduct and Learn from High-Quality Site Visits

A Smaller Learning Communities Program  
Grantee Guide



June 2010







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## About This Guide

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**Smaller Learning Communities Program (SLCP)** grantees often choose to use a portion of their grant funds to learn from other schools as they search for successful models that can be applied in their own school. Well-planned, thoughtfully coordinated site visits can contribute to advancing and reinforcing effective school redesign. High-quality school visits require visiting teams to select the appropriate school, look at the right programs, investigate the evidence of success, and follow up with a practical strategy for sharing and implementing what they have learned with colleagues at their own school. Done well, site visits can be a powerful professional learning experience.

Designed to offer practical guidance in an accessible, straightforward, user-friendly format, this guide will help visiting school teams maximize their visit to another school. This guide contains checklists to help visiting schools plan for and conduct effective site visits, as well as a recommended three-day site-visit schedule. In addition, the appendices provide detailed guidance and a sample two-day schedule to help host schools plan and coordinate a high-quality site visit. Finally, a companion document, the *Learning in Action: Resource Toolkit*, provides a bibliography of readings and resources that can be used to enhance the knowledge base of the site-visit team and the overall quality of the process.

The recommended three-day visit takes several factors into consideration. These include varying levels of understanding and commitment to smaller learning community (SLC) strategies on the part of team members, as well as a realistic assessment of the time needed for educators to absorb and embrace new ideas. Site visits allow for only a partial glimpse of strategies that, in many cases, have been developed and refined over years. For these and other reasons, the guide urges both the visiting and host schools to allocate sufficient time for the process, both for preparation and for the visit itself, and to complete the suggested checklist of tasks. A sample two-day schedule is provided in Appendix 2 to advise teams that have limited time to spend at a school.

Ideally, a site visit conducted in a spirit of thoughtful learning and sharing creates a mutually beneficial learning experience for both the visiting and host schools. The next section of this tool outlines a set of guiding principles for high-quality site visits that will set the tone for a truly collaborative learning experience.

# Guiding Principles for High-Quality Site Visits

## Learning from colleagues requires:

- A willingness to challenge personal beliefs, perceptions, and practices, and an open and receptive attitude toward new ideas.
- A professional, respectful, and transparent environment in which it is safe to converse, question, and discover.
- Openness to forging new relationships and a belief that every individual and school has valuable lessons to impart.
- Strong preparation and site-specific background information so that visiting teams are armed with current research on best practices and a detailed understanding of the school and strategies they will be observing.
- A common understanding of the vision, mission, goals, and expected student outcomes driving the work of both the host and visiting schools.



## The host school should provide:

- Evidence of improved student outcomes, including critical success measures across all student subgroups: for example, lower numbers of course failures and behavioral incidences, steady increases in test scores and graduation rates, and increased college enrollment, persistence, and degree-attainment rates.
- Evidence that the school uses student data to inform goals and shape school-improvement strategies, including action plans, model curricula, professional-development opportunities, and student-support systems.
- Evidence that teachers work and plan collaboratively to improve practice and ensure individual student success through professional learning groups, interdisciplinary teaching, or other team-based strategies.








- Descriptions of school structures and pedagogical strategies, and how they are systemically coherent and aligned with the school vision and SLCP goals.
- Descriptions of equitable, rigorous, and personalized practices that value all learners and learning styles and are intentionally designed to prepare every student to succeed in college, work, and life.
- Evidence that the school has a well-organized plan, detailed agenda, and thoughtful process for sharing its work with visitors.

# Building an SLC Knowledge Base

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**Many questions are generated when schools become involved in substantive school change:**

-  *Why does one school differentiate instruction in every classroom, while another creates structures that sort students by perceived ability or past achievement?*
-  *How do we know that theme-based or career academies work?*
-  *What does an effective small learning community look like? What equitable and personalized strategies have been shown to improve student achievement, aspirations, and life outcomes?*
-  *What results have been achieved by schools that “double-up” literacy and numeracy programs in the early years of high school?*
-  *What do we know about successful transitions from middle to high school or from high school to college?*

Site visits are one strategy to help educators answer these questions, see what works in other schools, and address the challenges of implementing effective school reform.

Approaching site visits with a strong understanding of effective, research-based strategies and effective organizational structures will help teams select schools with a demonstrated track record of success. During the site visit, this knowledge will also help team members maximize time on site by encouraging more thoughtful dialogue about the nuances of the host school's design and implementation.

The *Learning in Action: Resource Toolkit* provides a selection of articles and research for discussions among site-visit teams, professional learning groups, and school leaders. These resources were specifically selected with the planning process in mind. All the resources listed in the *Resource Toolkit* are free and available on the SLCP website. They are referred to, where relevant, throughout this guide. Specifically, the *Resource Toolkit* is organized as a companion guide to help with (1) building a knowledge base (see selections 1–11); (2) planning meetings (selections 12–17); and (3) informing activities during the visit (selections 18–31).

# Preparing for a Successful Site Visit

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To help facilitate site-visit preparation, this section includes background information and checklists that cover the most important elements of a high-quality visit.

## The Psychology of the Site Visit

Before undertaking the logistical preparations for a visit, it is useful to consider how people relate to change. Some people embrace it enthusiastically, while others are more resistant for various reasons. For example, some team members may disagree with or be skeptical of proposed school structures and classroom practices, given that they have seen school-improvement programs come and go over the years. Some may be fearful of losing their influence or position in the school, or they might be worried that teaching practices they have used for years will be viewed negatively. Some may even feel they are in competition with colleagues or faculty in other schools that are perceived to be more successful than their own. It is therefore essential that members of the site-visit team embark on a visit with an attitude of open-mindedness, enthusiasm, and respect.

To encourage these qualities, the principal, leadership team, or site-visit team leader should engage the visiting team, or even the entire school faculty, in an open discussion about the rationale for and intentions of the school's SLC work. In addition to reminding staff of the specific educational needs motivating this work—whether it be challenging community demographics, perennially low student performance, static graduation or college-going rates, or the need to continually improve educational outcomes for all students—this conversation should underscore that site visits are opportunities for personal and professional growth, as well as a way to acquire new knowledge about the school-improvement process.

## Quick Checklist for the Visiting Team

**The following checklist will help visiting teams prepare for a site visit:**

- ✓ Select site-visit team leader.
- ✓ Research potential host schools.
- ✓ Select a visiting team and schedule planning meetings.
- ✓ Prepare a statement of purpose for the visit.
- ✓ Select the host school and schedule the visit.
- ✓ Request information from the host school.
- ✓ Generate questions for the visit.
- ✓ Create a site-visit notebook of essential materials.
- ✓ Develop expected outcomes.
- ✓ Prepare a follow-up plan for how new learning may be turned into action steps back home.

## Detailed Visiting School Preparation Checklist

**Select a site-visit team leader** who will be responsible for coordinating all aspects of the site visit, including planning meetings.

- Identify one person to be the primary contact, coordinator, and go-to person for all matters related to the site visit.
- Specify the duties of the team leader, including preparing activities for team planning meetings, contacting the host school, coordinating logistics, confirming details, and maintaining communications between the visiting team and host school.

**Select a visiting team** that represents a variety of stakeholders from the school community, including administrators, teaching faculty, parents, school board members, district staff, local policymakers, and prominent community leaders.

- Be mindful that SLC funds cannot be used to support school board members or legislators who may be part of the team.
- Consider including one or more vocal “community skeptics” on the team.
- Develop a meeting schedule for the site-visit team to carry out the activities listed in this checklist.
- Discuss how many different site visits the team will conduct and the time frame required.

**Research appropriate host schools**, looking for alignment of vision, mission, strategies, programs, and student-outcome goals that focus on postsecondary and career success.

- Contact appropriate local and national organizations for recommendations of potential host sites.
- Contact local schools that may have privately funded school-improvement programs in place.
- Note schools that have been profiled for their successful strategies and practices.

**Prepare a written statement of purpose for the site visit**, outlining the specific objectives for the visit and the follow-up plan for turning professional learning into practical, goal-oriented action.

- Review the guiding principles to set the tone and get underway with team planning.
- Collectively prepare the statement of purpose that reflects the diverse viewpoints of team members and the school community they represent.
- Ensure that the statement of purpose reflects the specific needs of the entire student body and the challenges the school is striving to overcome. For example, if the school is located in an economically depressed manufacturing town with low graduation rates and low educational aspirations among students, the statement of purpose should reflect the community’s struggles and address the need to prepare all students for 21<sup>st</sup> century careers.
- A common statement, such as the example below, will serve as an ice-breaker and help the visiting team establish some common ground. *Example:* “Our schools are struggling to increase college-going rates in a community that has traditionally been supported by manufacturing jobs. The purpose of our site visit will be to uncover strategies used to

increase college preparation and access; raise academic expectations for both students and faculty; ensure success for all in an increasingly rigorous academic program; and provide every student with equitable access to programs that truly prepare students for college and work. In an era of increasing fiscal challenges, we need to understand what programs have been changed or eliminated (and how those decisions were made), what new programs have been implemented, and how resources have been reallocated. Finally, we seek to understand the role of parents and the community in the school-improvement process.”

**Schedule a site visit** with selected host school.

- Provide at least six to eight weeks of advanced notice when making the visit request, but the more advanced the notice the better.
- Submit the request during the summer, if possible, or at the beginning of the school year, with several months of lead time allotted.

**Request key background and programmatic documents** from the host school for the site-visit team to review and discuss before the visit.

- Documents may include elements of the school’s action plan, its vision and mission, performance data, program descriptions, exemplar policies, the course catalog and student handbook, and details of the school’s professional development plan (see *Toolkit* resource 13 for suggestions on ways to review data before the site visit).
- Details on student demographics, achievement data, and “aspirations” history are also essential to review.

**Formulate essential questions and goals for the visit:** What do we want to see? What do we need to learn and understand so that we can move our work forward? What do we want to achieve as a school this year? Next year? In ten years?

- Collectively develop and write down the essential questions and goals for the visit (see *Toolkit* resource 12).
- Remember that the purpose of the visit is to learn from—not evaluate—the host school and its practices.
- Devote some planning time to practicing interview and discussion skills, in addition to developing relevant questions.

**Create a site-visit team notebook** with relevant materials about the host school and the site visit (the *Resource Toolkit* includes many tools and protocols for developing this site-visit notebook). The notebook will serve as a manual and a model for future visits.

- Site-specific information should include key school documents (vision, mission, program of studies, action plan, etc.), student data and demographics, programmatic descriptions, and technical literature on specific school-improvement strategies.
- The notebook should include the essential questions and goals discussed above for guiding conversations and interviews in the host school and for use when observing classrooms or specific programs or when listening to presentations.



**Develop the site-visit schedule in collaboration with the host school.**

- Build in time to listen, observe, process, and debrief during the visit (see *Toolkit* resource 26).
- Schedule time for the visiting team to share its SLC action plan with the host school at the end of the visit (see *Toolkit* resources 30 and 31).
- Build in time to develop a communications strategy for how the lessons learned from the site visit will be shared with the home school (e.g., during faculty, professional learning group, or common-planning-time meetings, etc.). An effective communications strategy will help increase support for change.
- Devote three days for a site visit so that deep professional learning, which requires a greater time commitment, may occur. Three days is ideal, two days may be acceptable, and one day is probably not enough.

## Additional Comments about the Planning Process

This section presents further information to help both the visiting and the host school prepare for the site visit.

### Configuration of the Visiting Team

The ideal site-visit team reflects the varied roles within a school community, including voices from outside the building. But the most important characteristics of a site-visit team are its leadership and influence in the school community. Teams should include individuals who are empowered to implement changes at the home school, as well as those who are essential to supporting the process—both from within the school system and without. A site visit will be effective if the lessons it imparts are heard, understood, and acted upon by leaders who are in a position to effect change.

**In addition to leaders, the ideal site-visit team should include the following:**

- “Trailblazers” and “naysayers”—i.e., individuals who are already “on board” with the SLC work and motivated to get things done, as well as those who are “on the fence” and may need to be convinced that SLCs or other school-improvement strategies can be effective in reenergizing their school culture and improving student aspirations, achievement, and outcomes.
- Respected veteran teachers and other opinion leaders within the school community. School improvement is, in many ways, a political enterprise, and cultivating buy-in within the school building is essential to its success (see *Toolkit* resource 18).

### Selecting the Right Host School

**To help select the right host school, look for the following characteristics:**

- A culture, philosophy, and academic program that is unequivocally focused on educational equity and preparing every student to succeed in college and careers (see *Toolkit* resources 2 and 3).
- Strong student outcomes—specifically, improvements in test scores and graduation rates, college-going data, attendance patterns, disciplinary referrals, and other critical success factors—that indicate the SLC design and implementation strategies are effective (see *Toolkit* resource 13).
- Experience documenting and sharing SLC work in ways that facilitate an effective learning experience for the visiting team.



**Questions to consider include:**

- How is this school similar to ours? Do its size and student demographics mirror ours? Is it a large urban school or consolidated regional school in a rural area? (Note: The host school does not have to be similar to the visiting school in all ways—the most important thing is that the visiting team is confident that the site visit will provide valuable, relevant, and applicable lessons.)
- Has the school hosted site visits in the past? Is there a host facilitator—or principal, teacher leader, or project director—who has experience planning a site-visit schedule, including organizing groups to present the SLC work and engage in discussions with visitors?
- Are the hosts prepared to make specific recommendations about what works well during a site visit—for example, types of sessions, ways to organize the schedule, or student and parent groups that would be open to talking with the team?
- Is the host school able to provide release time for teachers and others to deliver presentations and participate in other site-visit activities?
- Will classrooms be open for observation during the site visit? Are the teachers accustomed to welcoming observers in their classrooms?

**Allocating Adequate Time to Learn from the Visit**

Given that educators are busy people with little disposable time, the tendency may be to schedule a site visit hastily or to schedule a shorter visit. This is not really a good idea. Single-day site visits rarely result in substantive improvements at the visiting school, since they typically lack the kind of in-depth conversations, strategizing, and planning that are needed to translate learning into action. And, as noted above, the visiting team may also include skeptics with serious questions or reservations about the school-improvement strategies being considered by their administrators and leadership team. In most cases, resistance to systemic school redesign is based on good intentions. These are educators and parents who care about their students and children and who don't want the school to undertake risky, experimental, or unconsidered actions that may inadvertently have a negative impact on the faculty or students. A one-day visit, even if well prepared, is unlikely to sway their viewpoint.

This guide recommends a three-day site visit (with the option for a half-day on the final day). A three-day schedule (1) allows members of the visiting team time to reflect upon what they have seen and revise their school's action plan during the visit and on site; (2) provides time to discuss, process, and integrate new learning, while considering the host school's practices in relation to the visiting school's particular needs and challenges; and (3) gives visiting and host educators a chance to interact, develop relationships, and see one another as colleagues and partners in the same fundamental, mission-driven enterprise.



## Preparing Materials for the Visiting Team

The site-visit-team leader should request key documents and other information from the host school to be included in the site-visit-team notebook and used during team planning meetings. As noted above, these materials may include the following documents and materials from the host school:

- Vision, mission, and beliefs.
- SLC action plan or other school-improvement plan; and previous site-visit schedules (if available).
- Current student-performance data and demographics.
- Program of studies and student handbook.
- Exemplar policies, particularly those that address assessment practices, graduation and course requirements, grading and reporting systems, or professional development programs.
- High-leverage pedagogical strategies—for example, those addressing the ninth-grade transition, college and career readiness, or early college programs.
- In addition to forming the foundation of the visiting team's preparations for learning, these documents will help the visiting school decide if a potential host school is an appropriate host site (see *Toolkit* resource 18).

## Making Team Planning Meetings Productive

The site-visit team leader and other qualified members of the visiting team need to review and select appropriate reference resources (such as those compiled in the *Learning in Action: Resource Toolkit*) so that planning meetings are productive, and the site-visit team notebook is focused, coherent, and useful. To help facilitate the planning and preparation process, we recommend that schools use a professional learning group format to provide a supportive structure for critical inquiry about institutional change (see *Toolkit* resources 12–14 and 17).

## Communicating with the Host School

Once a host site has been selected, the two schools should collaboratively develop a site-visit schedule. The visiting team should express its learning needs and desires, while also being mindful that the host school is making sacrifices and rearranging schedules and workloads to accommodate the visiting team. Flexibility, openness, and consistent expressions of appreciation build the relationships and trust that will ultimately make the site visit a success (see checklist in Appendix 1).

# The Site Visit

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The host school may already have a preferred schedule and agenda that it has refined over the course of previous site visits. Based on the needs of the visiting school, however, the site-visit program and timetable should be customized to address the specific questions of the visiting team.



## Components of the Site-Visit Schedule

**The ideal site-visit schedule includes:**

- Presentations and panel discussions that describe specific strategies and programs implemented to improve practice and student learning, provide necessary supports to students, and use data to track student outcomes.
- Facilitated interactive discussions among administrators, faculty, and students on specific SLC programs and strategies.
- Opportunities for visiting team members to talk with parents and community members, including those who have been involved in the school-improvement process, as well as others who may be interested in attending these discussions.
- A detailed presentation on the specific challenges the school faced during the SLC design and implementation processes, as well as strategies for addressing these challenges.
- First-hand observations in which the visiting team can see classes, programs, and other learning opportunities in action.
- Several opportunities for the visiting team to debrief presentations and process new information with a trained facilitator.

- Time for the visiting team to begin or continue planning for how lessons learned will be applied when they return to their school. In addition to developing an action plan, the site-visit team should also develop or revise its communications strategy for sharing what it learned and engaging others in the process.
- An opportunity for the visiting team to share its action plan with the host school, using a structured protocol, and to receive feedback on the plan.

## Quick Checklist for the Visiting Team

**The following checklist will help the visiting team during a site visit:**

- ✓ Arrive on time each day.
- ✓ Use individual and team time efficiently. Review the schedule as a team and determine individual assignments based upon interests and expertise.
- ✓ Keep an open mind.
- ✓ Focus on the purpose and goals of the visit. Avoid judgmental or evaluative conversations with colleagues, and never speak critically of the host school, especially in hallways, classrooms, and other public areas.
- ✓ Follow the schedule that has been planned for you. Respect the efforts the host school has made on your behalf and use team time at the end of the day to make any necessary adjustments.
- ✓ Express appreciation to the host school and staff for their hard work and willingness to open their school to the visiting team.

The visitor's role is to observe and ask questions specifically related to the intentions and goals of the visit. Members of the host school will be prepared to respond to questions that directly address their school-improvement process and the programs they have in place. They will also discuss how they overcame roadblocks and challenges during their presentations. They will not be prepared to comment on the status of the visiting school or offer specific advice on roadblocks it may encounter.

The visiting team should generally refrain from engaging in conversations about implementation problems until the visiting team presents its own school-improvement work on the final day of the visit. In general, it is unproductive to come up with reasons why the strategies being employed by the host school could not be implemented elsewhere. Every school culture and local political context is unique. A more helpful approach is to consider and discuss what would have to happen or change back home so that the desired outcomes could be achieved.

## Turning Learning into Action: Visiting School Follow-Up Process

Ideally, a visiting team will observe a school that has improved outcomes for students, ask hard questions, and come away with new information. The team's report-out should focus on the effective strategies observed and, if appropriate, ways to think about incorporating those strategies into the visiting school's SLC program. Ultimately, the school's administrators and leadership team will need to decide how to proceed and what to take away and act upon.

A detailed written plan for sharing lessons learned with the school community—particularly the teachers, administrators, and school board members who were unable to participate in the site visit—will help ensure new learning will not be lost. Time is of the essence, and an effective communications strategy is essential. Those who were not on the visit may need time and coaching to understand what was observed—understandably, they may not be as enthusiastic initially as site-visit team members about new ideas for the school's improvement process. Therefore, the communications strategy should include the following elements:

- A detailed written narrative or report on the visit, including the most important insights and lessons learned.
- Distribution to the entire school community (faculty, staff, parents, and other community members).
- A formal presentation to the school board.
- Three to five informal (but scheduled and facilitated) meetings with faculty groups.



Turning high schools into equitable and effective learning environments for all students is a difficult process under the best of circumstances. High-quality site visits can provide insights into the change process and effective strategies for improving student outcomes. Ideally, school visits should foster increased sharing and learning partnerships among SLC schools—the kind of networking that will facilitate change and support educators in this challenging work. The appendices to this guide and the *Learning in Action: Resource Toolkit* will help host and visiting schools participate effectively in this challenging but rewarding process.

## Sample Three-Day Site Visit Schedule

### Day One

Day One Activity	Suggested Length	Notes	Useful Resources
Arrival, refreshments, introductions, welcoming program, and review of the site-visit schedule	30 minutes	The host school will plan the welcoming program, provide a map of the building, and review logistics.	
Tour of the building	45 minutes	The time required for the tour may vary depending upon the layout of the building and the SLC structures that will be observed.	
Presentation by students	45 minutes	Focus on the classroom-level impact of the SLC program: How has it improved the student learning experience? (Putting student performance and outcomes first sets the tone and keeps everyone focused on the big picture.)	<i>Toolkit</i> resources 19 and 15
Observations of specific SLC programs	60 minutes	The observations may include an SLC team meeting, student projects or presentations of work, heterogeneous classrooms, early college programs, intervention programs, advisories, etc.	<i>Toolkit</i> resources 4–7, 9–10, 15, 18, and 22
“Our Journey of Change”: a presentation by principal and teachers	90 minutes (including break)	The goal of this presentation is to share how the work was accomplished and how it is being sustained and evaluated. The goal is not to convince the visiting team to adopt the same strategies, but to demonstrate why the host school is committed to its action plan. Include the school’s vision, goals, strategies, and evidence of success, while also making sure that obstacles are discussed and the SLC priority areas are addressed.	<i>Toolkit</i> resources 3 and 19
Lunch	45 minutes	Lunch is a good time to meet with parents, school board members, and selected teachers to hear informally about their role in the SLC process.	<i>Toolkit</i> resources 24–25

## Day One, continued

Day One Activity	Suggested Length	Notes	Useful Resources
Visits to classrooms and programs or structured conversations with teachers	60 minutes	Opportunities for the visiting team to revisit programs or follow up with staff members in case they have specific questions.	<i>Toolkit</i> resources 14, 18, and 21
Visiting team meets with host school facilitator to debrief the day	60 minutes	Discussion questions may include: What did you see? What did you learn? What do you need to know? What puzzled or confused you? The host facilitator clarifies questions using a debriefing protocol.	<i>Toolkit</i> resources 13 and 23
Visiting team reviews and finalizes plan for Day Two	45 minutes	The team may observe afterschool programs such as learning interventions, tutorials, dual-credit programs, etc. Dinner with selected faculty may be scheduled to socialize and connect.	



## Day Two

Day Two Activity	Suggested Length	Notes	Useful Resources
Arrival, continental breakfast, quick team huddle to review plans	15 minutes	Try to cover as many classrooms and different curriculum areas as possible.	
Classroom visits	2 hours	Use observation protocols when appropriate. Plan to spend at least 30 minutes in each classroom looking for evidence of engagement and rigorous, authentic, personalized learning.	<i>Toolkit</i> resources 14, 20–22, and 29
Break and debrief with facilitator	30 minutes	What did you see? What questions do you have?	
Teacher panel discussion: “How is it working?”	60 minutes	Focus on SLC implementation strategies (ninth-grade transitions, teaming, grouping practices, classroom practices, interventions, postsecondary planning, a college-preparatory curriculum for all students, etc.).	<i>Toolkit</i> resources 6–10, 14, 16, and 29
Lunch	45 minutes	Team time to debrief or engage in informal conversations.	
“Curriculum and Classroom Practice: Preparing All Students for Higher Education” (featuring teachers, counselors, students)	60 minutes	Essential question: In what ways does this school prepare all students for higher education, and how is the SLC program integral to this work? (Key concepts: intervention strategies, the core curriculum, academic support systems, the role of guidance, and data collection and analysis, etc.)	<i>Toolkit</i> resources 1, 4, 7, 9, and 13
Observe any additional classes or programs; discussions with students or teachers	30 minutes	Use this time to cycle back to ask unanswered questions or address burning issues.	
Team meeting to debrief the day, review the plan for Day Three, and finalize the presentation	60 minutes	This time is for the team to plan a presentation during which the team will share its SLC plan with the host school and receive feedback.	<i>Toolkit</i> resources 26–28



## Day Three

Day Three Activity	Suggested Length	Notes	Useful Resources
Arrival, review agenda	15 minutes	Conduct last-minute preparations for the team presentation.	
Visiting team presentation: “Our SLC Goals, Objectives, and Action Plan”	60–90 minutes	Using a tuning or consultancy protocol, the visiting team shares its SLC plan, identifies roadblocks, and discusses how they intend to incorporate what they have learned. The team receives thoughtful feedback from host SLC leadership team and teachers.	<i>Toolkit</i> resources 30–31
“Strategies for Getting Your School and Community on Board” (a presentation and discussion by SLC leaders)	60 minutes	The host school’s administrators, policymakers, and leadership team share their journey navigating roadblocks and overcoming resistance to reform.	<i>Toolkit</i> resource 19
“From Our Current Reality to Our Preferred Future” (a gap-analysis exercise for the visiting team)	90 minutes	A facilitated exercise (the host school provides facilitator) to help the visiting team clarify the structures and practices they want to implement and how they can get from where they are to where they want to be. Include strategies for engaging stakeholders and securing support and buy-in. This is time for the visiting team to begin modifying its action plan and timeline, while delegating specific tasks and responsibilities.	<i>Toolkit</i> resources 12–13 and 26–27
Lunch	45 minutes	Complete evaluation forms for the host school.	
Team planning time	TBD	Use this time to engage in any final conversations with the host school.  Before departure, refine or finalize the plan for how lessons learned will be shared with the visiting school community and incorporated into ongoing SLC work. Include events, dates, who will take the lead, etc.	<i>Toolkit</i> resources 12–13, 27, and 30–31

## APPENDICES

### APPENDIX 1:

## Hosting a High-Quality Site Visit

High-quality site visits require both the visitors and visited to be well prepared. In many cases, the host school will have much experience planning, scheduling, and hosting successful site visits—particularly if it is a nationally recognized model school. Still, every site visit is unique, with its own particular questions, challenges, and learning needs. For an inexperienced school, it's a good idea to conduct a scaled-down trial site visit.

### Quick Checklist for the Host School

**The following checklist will help the host school prepare for a site visit:**

- ✓ Communicate with site-visit team leader.
- ✓ Prepare a detailed schedule.
- ✓ Coordinate the logistics of the visit.
- ✓ Develop topics for presentations, discussions, etc.
- ✓ Inform the school community about the visit.
- ✓ Conduct preparation meetings.
- ✓ Prepare a short evaluation form.

**Communicate with the visiting school:** The host-school principal, leadership team member, or designated site-visit coordinator communicates with the site-visit team leader about the purpose and goals for the visit, as well as potential dates and agenda options.

- Make sure the schedule includes “normal” school days at the host school so that the visiting team can observe classes and programs in action.
- Ask detailed questions about the visiting school’s intentions and plans: What do you want to learn? How many people are you planning to send? Use this information to determine if the inquiring school is both serious in its commitment and a good fit for a site visit.

**Prepare a site-visit schedule:** Prepare a detailed schedule and agenda for each day, including a list of the protocols and materials needed for facilitation and preparation.

- Consult with the visiting school to ensure the schedule meets the team’s needs and make modifications to address the visiting team’s specific questions and school-improvement challenges.
- Network with other SLC grantees experienced in planning and conducting site visits to learn about their process, gain insights, and identify potential obstacles or common problems.

**Coordinate the logistics of the visit.** Set aside space for meetings and work sessions, make arrangements for meals, find subs for teachers, and prepare a packet of materials, including a school map, master schedule, wireless network password, and other essential site-specific information.

- Communicate with the visiting school to determine what preparatory materials are needed, particularly if the visiting team is compiling a detailed site-visit notebook. In this way, redundancy of materials can be avoided and preparation time minimized.
- Set aside parking space, arrange to greet visitors, have nametags prepared, organize a brief tour of the building, and provide a floor plan with room numbers.
- Develop a short welcoming program: address logistics, review the schedule, provide a packet of relevant materials, and share wireless network password, etc.

**Develop the presentations:** Consult with the visiting school to develop topics for presentations, panel discussions, work sessions, and team meetings, etc.

- Select representative groups of teachers and students to participate in presentations and panels.
- Make sure that faculty members leading the site-visit sessions are both knowledgeable and articulate about their subject—the ideal candidates are often experienced presenters who have been trained in group-facilitation techniques and protocols.
- Select appropriate protocols and resources, and cross-reference these with the planned presentations and discussions.

**Inform the entire school community:** Notify the faculty and staff of the visit, including which classes will be visited.

- Make sure the school community is aware of the visit by notifying them as early as possible. Make the announcement in writing and electronically, and send out at least two reminders at four weeks and one week before the visit.
- Prepare a list of classes that can be observed by visitors and make sure that visiting team members have the information they need to find the appropriate class.
- Discuss the classroom-observation process with teachers and make sure they are comfortable with the format and will welcome visitors.

**Conduct preparatory meetings:** Hold meetings with the faculty, students, parents, and community members who will be directly involved in the visit.

- These meetings should address specific roles and responsibilities, presentation objectives and content, and other critical details to ensure the seamless execution of the visit (see *Toolkit* resource 20).
- The agenda for the site visit will evolve out of these discussions. Make sure that a final copy of the agenda is provided to all staff members and made available online.

**Prepare a one-page evaluation form to be completed at the end of the visit.**

- Use the surveys to improve future visits and provide positive feedback to teachers.
- Focus the evaluation on the process and substance of the site visit—it is not an opportunity for the visiting team to comment on the quality, configuration, or progress of the host school's SLC program.
- Consider creating an online version of the evaluation. In addition to modeling the use of technological applications, online survey software can make collection and compiling this information much easier.

## More about the Role of the Host School

### Program Planning

Host schools need to assign coordination responsibilities to one person with the time and expertise required to develop a high-quality program and prepare staff involved in the presentations and panel discussions.

- The host school's primary role is to ensure the site-visit program will provide learning opportunities relevant to the visiting school's needs.
- Depending on the school or district, this person could be a lead teacher, counselor, curriculum coordinator, SLC program director, or school administrator.
- Over time, host schools build internal capacity to do these visits well. Conduct a scaled-down trial site visit as a first effort (see Appendix 2 for an example of an abbreviated schedule), and then do a thorough debrief of the process.
- Select teachers who can speak eloquently and engagingly about the school's redesign work and who have a strong understanding of the school's evolution over time.
- Teachers who were initially skeptical about the school-improvement work are often the best spokespeople, since they can speak with sympathy and authenticity to the hesitations and skepticism that some visitors may be experiencing.
- One of the many benefits of hosting a site visit is that it allows administrators, teachers, and students to express their vision for the school and how they, in their individual roles, fit into the larger, long-term vision. Sharing professional practices and accomplishments can be very rewarding experiences for educators, since it requires administrators and teachers to be reflective about their professional life and candid with themselves and others about what is, and is not, working. Having students participate in this process empowers them and illustrates their key role in increasing their achievement and educational outcomes, while also reminding everyone else what this school site visit is all about.

### Host School Debrief

The host school's debriefing process should include reviewing the visiting team's evaluations, discussing what worked well, and making adjustments to the site-visit process and protocols. In many cases, the host school can learn as much from a site visit as the visiting school.

Other benefits include the opportunity to look anew at the school's redesign work and clarify specific strategies to those outside the school. Ideally, host schools could become "mentoring hubs" for SLC grantees or other visitors, allowing schools to develop relationships that provide ongoing dialogue, support, and opportunities to "tune" new ideas in a safe environment. Schools that are frequently involved in a site-visit process learn to be more public and transparent about both individual classroom practice and schoolwide policies and practices.

## APPENDIX 2:

# Sample Two-Day Site-Visit Schedule

The modified two-day process described in this appendix involves one on-site day at a host school and one full day of independent follow-up activities for the visiting team. With less time provided for observation of and interaction with the host school, it is strongly recommended that visiting teams take a full follow-up day to debrief the visit, process observations, and consider how the visit will impact their school's SLC work.

Ideally, a facilitator from the host school would be available to assist the visiting team during the follow-up day activities. Responding to probing questions, providing feedback on new thinking, and helping the team maintain a positive tone and stance in its conversations requires skill and experience. If the host school is unable to provide a facilitator, the visiting team should engage a facilitator who is familiar with SLC school-improvement strategies, but is not a staff member from the visiting school. SLCP funds may be used for this purpose.

### For this modified schedule, teams should:

- Increase their size by one-third (from eight to twelve members, for example) so that time and observations can be maximized during the visit.
- Meet for one full day following the visit to carry out the team planning and debriefing activities that would have been part of a three-day site visit.
- Secure the services of a trained facilitator from the host school to work with the team during the follow-up day—ideally, the facilitator would be someone who helped plan or participated in the site visit.

## Sample Two-Day Site-Visit Schedule

### Day One

Day One Activity	Suggested Length	Notes	Useful Resources
Arrival, refreshments, introductions, welcoming program, and review of the site-visit schedule	30 minutes	The team is split up to cover both classrooms and SLC strategies later in the morning.	
Tour of the building, including SLC structures	30 minutes	The time required for the tour may vary depending upon the layout of the building and the SLC structures that will be observed.	
Presentation by students	45 minutes	Focus on the classroom-level impact of the SLC program: How has it improved learning experiences for all students?	<i>Toolkit</i> resources 19 and 25

## Day One, continued

Day One Activity	Suggested Length	Notes	Useful Resources
Classroom visits and observation of SLC programs	60 minutes	Activities are divided among the team: half observe classrooms and half observe specific SLC programs. Observations may include an SLC team meeting, student projects or presentations of work, heterogeneous classrooms, early college programs, intervention programs, and advisories.  Observation protocols should be used when appropriate.	<i>Toolkit</i> resources 4–7, 9–10, 15, and 22
“Our Journey of Change”: a presentation by principal and teachers	90 minutes (including break)	The goal of this presentation is to share how the work was accomplished and how it is being sustained and evaluated. The goal is not to convince the visiting team to adopt the same strategies, but to demonstrate why the host school is committed to its action plan. Include the school’s vision, goals, strategies, and evidence of success, while also making sure that obstacles are discussed and the SLC priority areas are addressed.	<i>Toolkit</i> resources 3 and 19
Lunch	45 minutes	An informal lunch meeting with parents, school board members, and selected teachers to hear about their role in the SLC process.	<i>Toolkit</i> resources 24–25
Concurrent sessions: (1) Teacher panel and (2) “Building School and Community Support” (featuring SLC leaders, administration, and school board members)	60 minutes	1. The teacher panel should focus on SLC implementation strategies (teaming, grouping practices, interventions, etc.), how the school prepares all students for higher education, and how the SLCP is integral to the work.  2. SLC leaders and administrators should share strategies they used to navigate roadblocks, build support within the community, and overcome resistance to reform.	<i>Toolkit</i> resources 3, 6–10, 14, 16, and 29
The visiting team meets with its facilitator to finalize the agenda for the next day’s follow-up team meeting.  Visit additional programs, if time allows.	30 minutes	Consider burning questions from the team: What do you need to know? What puzzled or confused you?  The team may observe afterschool programs such as learning interventions, tutorials, dual-credit programs, etc.	

## Sample Follow-Up Team Meeting Schedule

### Day Two

Day Two Activity	Suggested Length	Notes	Useful Resources
Arrival and overview of the day	30 minutes	The facilitator reviews and modifies (if necessary) the schedule, goals, ground rules, and protocols that will be used during the day.	
What did we see? What did we learn?  What questions do we have?	60 minutes	Facilitated debrief: What did we observe in classrooms? What SLC programs were in place, and why were they effective? What did we hear and learn from the teacher panel, the students, and the administrators? Use a chart or a slideware application and projector to record questions.	<i>Toolkit</i> resource 31
Break	15 minutes		
What evidence did we see and hear that shows the host school's SLC program is working?	30 minutes	Facilitated roundtable in which the visiting team shares perceptions and evidence (using data, observations, student comments, of examples of teacher practice and community buy-in).	<i>Toolkit</i> resource 31
What are the implications for our work?	45 minutes	The visiting team reviews its current action plan, assessing goals, objectives, and strategies in light of what team members have observed. Based on what we have learned, what needs to be modified? Is our action plan on target? Where is it missing the mark?	
"From Our Current Reality to Our Preferred Future" (a gap-analysis exercise for the visiting team)	90 minutes	A facilitated exercise to help the visiting team clarify the structures and practices they want to implement and how team members can get from where they are to where they want to be. Include strategies for engaging stakeholders and securing support and buy-in. This is time for the visiting team to begin modifying its action plan and timeline, while delegating specific tasks and responsibilities.	Resource <i>Toolkit</i> 26 (gap analysis)
Lunch	30 minutes		

## Day Two, continued

Day Two Activity	Suggested Length	Notes	Useful Resources
Team develops recommendations for revising the school's action plan and designs a presentation for stakeholders. Before departure, identify groups and potential dates for presentations, select presenters, and, if time allows, conduct a quick trial run.	120 minutes	<p>Facilitated work time for the visiting team to begin revising its action plan and timeline based on what it has learned in the host school. The team should also begin to delegate specific tasks and responsibilities at this time. The new or modified plan (revised goals, objectives, and strategies) will be presented to administrators, faculty, and stakeholders.</p> <p>Key elements of the presentation should include:</p> <ul style="list-style-type: none"> <li>(1) observations and learnings from the host school;</li> <li>(2) implications for SLC work;</li> <li>(3) overview of the school's current reality compared with its preferred future (a review of student data);</li> <li>(4) overview of the revised SLC plan, including details on proposed timeline and task assignments; and</li> <li>(5) data that will be collected for the purposes of evaluation.</li> </ul>	